

Final report of the

AACRAO Task Force on Institutional Gender Identity Recognition

November 2012

AACRAO (Association) recognizes the need for discussion of several topics regarding records of transgender students. This Task Force was established by the Board of Directors (Board) to discuss institutional recognition of gender identity (see Appendix 1). Members were appointed from across the country, as well as from one campus overseas (see Appendix 2). Members are from a cross-section of our profession, representing community colleges, 4-year schools, and graduate schools, as well as both private and public institutions.

The Board requested a review of a specific set of recommendations (see Appendix 3) submitted to the Association from The Consortium of Higher Education Lesbian Gay Transgender Resource Professionals (Consortium). The Board also asked the Task Force to address issues of data storage and data reporting, as well as whether the Association should take a position on the issue and/or develop a set of best practice recommendations.

The Task Force conducted the two meetings via telephone and online (see Appendices 4 and 5). During the first meeting, the Task Force concentrated on the recommendations of the Consortium. The topics data storage and data reporting, as well as the Association's position on this issue, were discussed in the second.

Consortium Recommendations

In general, the Task Force agrees with the Consortium's ideas. However, there are specific recommendations that the Board should consider before providing Association endorsement.

The Consortium first suggested replacing any question about sex with a question regarding gender identity. The Consortium also recommended adding a second question regarding sex only for single-sex institutions.

The Task Force considered the idea of suggesting that institutions ask questions that address both legal sex and gender identity. However, upon reflection, especially after hearing comments from an attorney who researches transgender law, the Task Force came to the conclusion that institutions should stay away from trying to define gender, gender identity, sex, legal sex, etc.

The Task Force feels that asking two questions is the best action, the first asking sex (or gender) and the second asking for a preferred pronoun. The Task Force recommends the options of he,

she, ze, or none (the institution would have a fifth option of “blank” if the student did not answer the question).

The Consortium’s second recommendation was to enable students who have not legally changed their name to use a preferred first name on all campus records and documentation. The Task Force feels that using a preferred first name is acceptable for some documents, but that the legal name must be kept on others. The Task Force suggests that the Association’s recommendation should be that institutions allow students to use preferred first name on internal documents such as class rosters and directories, as well as in the naming convention for email addresses (if applicable). The Task Force feels that official transcripts must continue to use only the legal name. In addition, the Task Force believes that it would be appropriate for local institutions to make their own decisions about documents such as ID cards and diplomas, following suggestions of best practices offered by the Association. For example, some schools already allow preferred first names on diplomas (one example would be those that allow graduates to use names given to them by religious orders rather than their legal name), yet others do not because of certain regulations in their states that permit diplomas to be used as a means of identification. In the case of the diploma, the Task Force suggests that this decision should be made at the institution. While the Association could provide a list of best practices, the Task Force believes that the best solution is the local solution.

The Consortium’s third recommendation was to enable students to change their gender on campus records and documents, and gives samples of documentation on which to base that change. Because the Task Force has already suggested that the Consortium’s first recommendation, replacing sex with gender identity, be altered to recommend collecting data for sex and preferred pronoun, each will be addressed separately. Institutions should allow students to change their preferred pronoun as they wish. However, because regulations and practices regarding the changing of sex vary from state to state, the process should be determined by each institution. A list of best practices could be provided by the Association to help guide institutions that may seek them. However, the Task Force feels that it is important that the Association stress that institutions need to establish a procedure for students to change their sex on their official record.

Data Storage and Reporting

To follow through with the Task Force’s recommendations of collecting and using a preferred first name and a preferred pronoun, institutions would likely be faced with data system modifications. Major student software such as Banner, Colleague and PeopleSoft each contain fields for storing a preferred first name, yet none use that field in the places where the task force recommends (such as rosters). Also, none of those systems has a field for preferred pronoun. While the Task Force recommends that institutions consider these modifications, the Association should strongly urge the major vendors to make these modifications to their baseline products.

Once institutions are able to collect and store this information, they will face additional challenges. For example, would institutions be able to consider these new data elements as directory? FERPA states that gender cannot be considered directory information. While the Task Force feels that this should be interpreted to include preferred pronoun, it is debatable how

this would apply to preferred first name. The Task Force recommends further study. Other challenges would also need further discussion. For example, after the data is collected, how are changes to be handled, especially at institutions where the database is shared? How is the old data archived after changes are made? What about parent/guardian fields (as opposed to mother/father)? The Task Force also recognizes the issues that might be created regarding reporting: whether, and if so, how, the data should be reported. The interactions of our data with other internal constituencies (such as Residence Life) and outside agencies (such as the NSC, ABA, NCAA, etc) need to be considered.

Role of the Association

While the Task Force agrees in principal with the ideas behind the formation of the Consortium's recommendations, the Association should not endorse them exactly as presented. Instead, the Task Force believes that the Association should:

- take the position that institutions should continue to collect the sex data element as they currently do, and to add the two additional data elements of preferred pronoun and preferred first name,
- develop a set of best practice recommendations for the use of preferred first name,
- take the position that institutions should develop a procedure for students to change their sex on their official record,
- develop a set of best practice recommendations for the development of procedures for students to change their sex on their official record, and
- urge major vendors to make modifications to their baseline product to allow for the collection and use of preferred pronoun and preferred first name.

Role of the Task Force

In this report, the Task Force has recommended further study regarding the application of FERPA to the proposed new data elements; the effects that these new fields would have on data storage; the processing, archiving, and sharing of the new data elements; the consideration of further data elements such as parent info; and the interactions of the data with both internal and external constituencies. Also in this report, the Task Force has recommended the development of best practice recommendations for the use of preferred first name and the development of procedures for records changes. Because of these recommendations, it is suggested that the Board continue the work of this, or a similar, Task Force to further study and develop these best practice recommendations.

Respectfully submitted on November 22, 2012,

Steven E. Smith, Chair

Appendix 1

AACRAO Task Force on Institutional Gender Identity Recognition

(Approved 4/1/2012)

Background

The Consortium of Higher Education Lesbian Gay Bisexual Transgender Resource Professionals (Consortium) recommends the inclusion of gender identity on institutional forms and documents. The Consortium believes this will help transgender students feel welcomed and included on college campuses, and will raise the awareness at institutions of the presence and needs of transgender students.

AACRAO's LGBT Caucus reviewed the Consortium's proposal and supports addressing the need for institutions to recognize gender identity effectively. The Caucus asked AACRAO's Vice President for Access and Equity to propose to the Board of Directors that AACRAO review the Consortium's recommendations and begin a dialogue on this topic.

The Board of Directors agreed to create a Task Force on Gender Identity Recognition. This task force will review the recommendations from the Consortium as well as issues of data storage, data reporting, and whether AACRAO should 1) take a position on this issue and 2) develop a set of best practice recommendations.

Charge to the Task Force

The AACRAO Task Force on Gender Identity Recognition will examine the need for and appropriate methods of collection, recording, and reporting of gender identity in higher education student record systems. To this end, the task force will:

- Complete a full review of the recommendations from the Consortium.
- Consider recommendations for best practices in managing these data.
- Determine whether a policy statement regarding such data is warranted.

If in fulfilling its charge the task force identifies opportunities to raise awareness and sensitivity of LGBT issues to the membership, such opportunities should be included in the report.

The Task Force will report its preliminary findings and recommendations to the Board of Directors no later than September 15, 2012. A final report will be submitted by November 15, 2012.

Appendix 2

Task Force Members

Steven Smith, University Registrar - University of Maryland, Baltimore County
Chair of the AACRAO LGBT Caucus

Jack Miner, Associate Registrar - Ohio State University

Tammy Johnson, Director of Admissions - Marshall University
Member of the AACRAO Admissions Policies and Practices Committee

Keith Williams, University Registrar - University of Vermont

Vern Granger, Associate Vice President and Director of Admissions - Ohio State University

Monique Snowden, Assoc. Prov. for Academic & Enrollment Services - Fielding Graduate Univ.
Chair of the AACRAO Graduate and Professional Schools Issues Committee

Tina McEntire, Assoc. Prov. for Enrollment Management – Univ. of North Carolina at Charlotte

Reta Pikowsky, Registrar - Georgia Institute of Technology at Atlanta
Member of the AACRAO Institutional Research Committee

Chris Dorsten, Assistant Registrar - Cuyahoga Community College
Chair of the AACRAO Community College Issues Committee

Judith Calvert, Assistant Dean and Registrar - Yale Law School

River Montijo, Registrar - Virginia Commonwealth University in Qatar

Also participating:

Luisa Havens, Exec. Dir. for Enrollment Serv. and Dir. of Admissions – Univ. of Texas, El Paso
AACRAO Board Liaison; AACRAO Vice President of Access and Equity

Lou Weaver, student – University of Houston
Alumnus, Houston Community College

Kristin Waters, Assistant Registrar - University of Maryland Baltimore County
Recorder of Minutes

Appendix 3

Recommendations for Supporting Transgender Students

Submitted by the Consortium of Higher Education LGBT Resource Professionals

Increasingly college and university students identify as transgender, but do not have the opportunity to indicate this identity on admission forms or other institutional documents. As a result, they do not feel welcomed or included, and institutions remain unaware of the presence and needs of these students.

Recommendation: Ask “Gender Identity” on College Forms and Surveys

Include the following when asking “gender” on admission forms and other documents:

- Ask “woman, man, transgender, another identity (please specify_____).”
- Offer the capability to select more than one option.
- Ask “sex” only in special situations (i.e., single-sex colleges).

Example

Gender Identity (select all that apply):

- Woman
- Man
- Transgender
- Another identity (please specify_____)

If you must legally ask sex (female/male) because of being a single-sex institution:

- Ask “sex” using the required binary of female and male.
- Additionally, ask “gender identity” as stated above.

Example

Sex (select one):

- Female
- Male

Gender Identity (select all that apply):

- Woman
- Man
- Transgender
- Another identity (please specify_____)

Recommendation: Enable Students to Use a Preferred Name on Campus Records and Documents

Revise software and processes to allow students who have not legally changed their names to have a preferred first name on course and grade rosters, online directory listings, identification cards, and other institutional records and documents.

Recommendation: Enable Students to Change Their Gender on Campus Records and Documents

Create a process by which students can change the gender on their campus records upon the request of the students or with only a letter of support from a licensed mental health counselor or medical professional.

This process means:

- Students are not required to have changed the gender on their birth certificate or driver's license prior to changing campus records.
- Students do not have to produce proof that they have modified their body.

Appendix 4

AACRAO Task Force on Institutional Gender Identity Recognition Conference Call: Monday, July 23, 11:00am

Participants:

- Steve Smith, Chair
- Judith Calvert
- Chris Dorsten
- Tammy Johnson
- Jack Miner
- River Montijo
- Reta Pikowsky
- Monique Snowden
- Keith Williams
- Luisa Havens, Board Liaison
- Lou Weaver, Student
- Kristin Waters, Recorder

I. Welcome and Introductions

- a. Steve: Welcome to the call and the go to meeting site. Two options are being used as a way to ensure that everyone can make comments. If you aren't able to make comments on the phone, sent me a chat line so I know to call on you.
- b. All members on the call introduced themselves

II. Review of Charge:

- a. Review Recommendations from Consortium
- b. Discuss Data Storage/Reporting
- c. Discuss if AACAOA should take stance

III. Recommendation 1: Ask "Gender Identity" on College Forms and Surveys

- a. Jack: From a practical sense, we need to ask what would schools have the easiest reaction to with the least resistance? Maybe the compromise is to equate Woman = Female and Man = Male. We need to put this into language that people are used to.
- b. Lou: I understand this point, but we need to include 'transgender' to include all students.
- c. Jack: Is transgendered needed or can we keep it open as another identity? We find that people don't identify as transgendered – there is fluidity in woman/man and a lot of differences in transgender.
- d. River: My son is currently transitioning and is applying to college. He is finding it difficult to fill out college applications; he identifies as a woman but is legally a male. It might be confusing for him if he had the option of 'transgender' because he identifies as a female.
- e. Lou: During the transition phase/stage, students may not understand: they identify with one, but they are associated with another and may ask, "Which sex am I legally allowed to

pick?” since the admissions application is a legal document. What do we do for students who haven’t started any legal changes yet but have just started to transition? For example, when I started, I didn’t know if I check the box of what my body is or what I associate myself with.

- f. Reta: This is a hard process that we need to help students with along the way.
- g. Lou: A marker may not be an easy guess for students who are in the process. Can they check more than one box?
- h. Steve: Would this question be better if the recommendation were to ask both questions: “legal sex” and “Gender identity”? Would this be helpful?
- i. Lou: Yes. It may be better to get the information, but there are still other areas to consider like preferred name and how other things such as financial aid are affected.
- j. Keith: It is important to have information on the student’s legal sex, for example, for medical reasons or for insurance. Also, insurance may need to know the legal or preferred name of a student. I disagree with getting away from asking legal sex. Sex and gender are different. We use preferred pronoun. The options are: he, she, ze, none. We also allow students to leave the form blank.
- k. Judith: Perhaps we can have a legal designation and then a separate designation for gender. This is more than admissions criteria. We need to give students options.
- l. Steve: What if we maintained two different questions, such as 1) Legal sex (M/F), and 2) Gender Identity?
- m. Jack: I like that and we should have two options in the Gender Identity spot (Woman/Man).
- n. Lou: The Gender Identity questions should include Transgender because some people might pick Man and Transgender, since the question says to select all that apply. They also have the option of writing in the blank. Having Transgendered as an option shows our students that we are open and are not hiding anything.
- o. Monique: We have it broken as two questions in our admissions application – we have a lot of questions about it when students are filling out the application.
- p. Keith: We wanted pronoun to be asked over the gender identity question. The students thought it was easier to define he/she. They criticized the transgendered – it was prying and a challenge for them to pick. Also, in Banner, we use sex as preferred pronoun.
- q. Steve: How do others feel about gender identity vs. preferred pronoun?
- r. Lou: We need students to feel respected and see that we respect them. This makes sense, I don’t see the problem.
- s. Tammy: I had a student who preferred ‘They’. But question – how do you get the preferred noun information to faculty?
- t. Keith: We also had a unique situation – a student said that there weren’t any options for them on the form. For the pronoun, we modified the class list to include this information.
- u. Jack: We need to remember that there are a lot of schools that are in different places when it comes to Gender Identity. Setting forth with these recommendations is a big deal and will be monumental. But the pronoun may be a hard for admissions to get and as a result, may not get any information. We may get more schools on board by being more mainstream.

- v. Tammy: This is a great concern, but I'm not sure how much difference there'll be. There are a lot of institutions where it's not so much about asking the question but of having ones who are educated to understand the question.
- w. River: We need to ensure confidentiality as well.
- x. Tammy: Students need to know that this question is optional.
- y. Luisa: How many have gender/sex listed as directory information? (Most said they do).
- z. Keith: For us, we found that faculty members were comfortable with having the information, but not with collecting it. At faculty orientation, we review what pronoun to use on the first day of classes.
- aa. Judith: We need to emphasize that we had requests from faculty to have a designation on the roster because they don't want to see a name and assume a gender, so faculty may be really on board with this.
- bb. Keith: Agreed. We need to go in the right direction, but not push too far. I appreciate Jack's thoughts on this.
- cc. Steve: I am thinking about Jack's point regarding what how monumental this could be. If we ask about gender identity, then we are saying that we recognize a population that we've been overlooking for quite some time. I wonder if leaving that off and using pronoun instead may be overlooked by students?
- dd. Tammy: I agree that pronoun may be overlooked. I think it goes to the heart of how we ask the question – will how we ask it be perceived differently?
- ee. Keith: This is a great marketing tool for admissions staff. Something else that we discovered after we put this into practice is that the majority of students who change their preferred name are not actually transgender students; students feel the need to own their own identity.
- ff. Lou: The preferred name piece is also very beneficial for our international students. Let's give the ownership to the students.
- gg. Monique: There is middle ground that we need. This is an opportunity for education for the leadership as well.
- hh. Jack: Could we ask that the recommendation provide good examples to be included?
- ii. Monique: Students should be responsible. We'll have varying opinions so we need the middle ground and this will be useful to our membership.
- jj. Tammy: I really like the idea of providing a list of best practices because schools can note that AACRAO is involved, but can act based on their needs, backgrounds of students, etc.
- kk. Steve: It sounds like we are suggesting that the recommendation have two questions, with suggestions on how to define gender identity for the second question. (i.e. preferred pronoun or gender identity).
- ll. River: Preferred pronoun simplifies the question. It doesn't get into the personal space of our students and serves a lot of purposes. We also need to be mindful of the future as there are more and more differences between people that are being recognized.
- mm. Steve: Question for Board Liaison: Is the Board looking for a straight up/down, yes/no answer to whether we should endorse the Consortium's recommendations, or can we make additional suggestions to those recommendations.

- nn. Luisa: The board wants us to make a suggestion to the support the cause, and allow institutions to be more supportive; to make institutions more inclusive, and we recommend how we think the consortium meets this. They are asking for endorsement and we will endorse something we see as a best practice. Basically, if we say we endorse the recommendations with our added changes, then so be it.
 - oo. Steve: So what I am hearing is that we want to suggest asking both questions, with the section question on gender identity to be preferred pronoun with the following options: he, she, zhe, none?
 - pp. Monique: No – I heard that the options for the second question could be based on the individual school; they could use either gender identity or preferred pronoun.
 - qq. Judith: We need to endorse the concept that schools are more inclusive and we provide best practices on how to do it.
 - rr. Jack: I like this suggestion because it gives room for schools to make decisions and allow students to have a voice on the question, because each institution has its own student culture.
 - ss. Monique: Schools would manage flexibility of being inclusive on their campus based on the student body.
 - tt. Keith: Agreed. This gets schools to have conversation and create a dialogue on their own campus.
 - uu. Steve: Great – so it sounds like the recommendation will be to ask two questions on gender identity on college forms and surveys, with the first asking for legal sex (male/female), and the second in regards to gender identity. We will recommend that schools use either gender identity options or preferred pronoun options, based on their institutional culture and will incorporate this information into a list of best practices.
- IV. Recommendation 2: Enable Students to Use a Preferred Name on Campus Records and Documents
- a. Steve: Most of our student information systems allow for a preferred name, but it tends to be informational data only – most do not use it anywhere. I'd like to ask Keith to talk about the modification that the Univ of Vt has done to allow the use of preferred name.
 - b. Keith: We had a banner modification. It was a lot of work because the name touches so much on campus, for example: paychecks. We had to answer what is legal versus preferred.
 - c. Judith: We've been looking into this and have been using it for our online facebook, but we don't have it on our rosters yet. We use preferred name first. We use legal or preferred name for first and last name. We do not use preferred name on transcripts or diplomas.
 - d. Keith: A school that uses preferred name in one place but not all places is creating more inconsistency. I see diploma differently because it's not a confirmed document of completion/graduation, which is why we will print preferred name on the diploma.
 - e. River: We need to be mindful of the safety of the students because there is still a high amount of violence against students who are transgendered.
 - f. Keith: For the ID Cards – if you change your name in the system, you can get a second ID Card so you can choose who to identify as.
 - g. Steve: Is there an issue with campus ID and showing that as a form of ID?

- h. Jack: What are other things, from the student perspective, that are off campus where there is a need to match name? We need to think of both internal and external services.
 - i. Judith: There are two pieces here: first, we need to determine what are the documents that are considered legal and second, get AACRAO to go to the software providers and say that the best practice is to use preferred name, so the providers modify the system versus individual schools doing modifications to their system.
 - j. River: Agreed
 - k. Judith: Also, the cost for individual modification is enormous because every time there is a system update, the school needs to remember to make enhancements to their system that will support to new update.
 - l. Steve: I think that's a good idea. I hope that AACRAO will be able to help influence the software providers that they make a change to the delivered systems that allow institutions to use preferred name rather than just as informational data stored in the system.
 - m. Lou: Are we also looking into email in terms of the preferred name?
 - n. Judith: At Yale the students can change their alias to be preferred name. The actual address stays the same, but no one sees that name.
 - o. Steve: We should probably make this recommendation to be a suggestion based on best practices also, because at my institution, even if someone uses your alias, if you reply to that email, it's your official address that shows in the "from" box
 - p. Lou: What about the preferred name in blackboard?
 - q. Steve: I think email and blackboard should be included in the recommendation with internal institutional records. So it sounds like the recommendation will be to allow students who have not legally changed their names to have a preferred first name on course and grade rosters and online directory listings and email addresses, while external documents such as official transcripts should continue to use legal name; a list of best practices can be established to help schools determine which name is best to use on their campus for identification cards and diplomas.
- V. Recommendation 3: Enable Students to Change Their Gender on Campus Records and Documents
- a. Steve: The Consortium is recommending allowing the record to be changed based on documentation from a medical professional or mental health counselor. What are thoughts on this?
 - b. Jack: We accept these documents. We used to require documentation from mental health counselor, but students complained about this, as it plays into the misconception that it's a mental disorder, so we now accept documentation from a medical professional. This is an issue for states that don't have sex on birth certificate. In some states, people do not get an identity until they enter the education sector, and then sex, regardless of gender, carries with them throughout the entire educational system.
 - c. Steve: How does NCAA work with this?
 - d. Lou: NCAA has their own set of rules and regulations – it is very thorough. They use Olympic standards that have been modified.
 - e. Steve: It sounds like we support recommendation #3.

- f. Jack: There are enough places where sex is showing up that there is a need for this recommendation. The recommendation is how schools can change legal sex at the school. This needs to be based on sex and gender. You can change pronoun as you wish but then how do you change the sex? This is likely to be different based on state law. In Ohio, there is no legal way of changing your sex, so we do it. Other agencies in the state have started following our lead.
- g. Steve: And this varies greatly from state to state, as in Maryland, it's easier to change sex on the driver's license, without any documentation of a medical change.
- h. Jack: We need to have a way to change legal sex, and if the student's home state doesn't have a way to change it, we need a way to support the student in change.
- i. Steve: So we could create a best practice, not a recommendation. The recommendation could read that each institution needs to have a process/procedure for how to change both gender and legal sex on campus records, with a list of best practices.

VI. Wrap up

- a. Steve: I will schedule our next conference call. In the mean time, we will type up a synopsis of our discussion and our suggestions regarding the Consortium's recommendations. I'll email that to the Task Force for feedback. At that point we'll decide whether we'll need to revisit any of this section, or if we can move forward to the remainder of our charge.
- b. Call concluded at 12:33pm

*Notes submitted by:
Kristin A. Waters, Recorder*

Appendix 5

AACRAO Task Force on Institutional Gender Identity Recognition Conference Call: Thursday, August 23, 2:00pm

Participants:

- Steve Smith, Chair
- Judith Calvert
- Vern Granger
- Tammy Johnson
- Jack Miner
- River Montijo
- Monique Snowden
- Keith Williams
- Lou Weaver, Student
- Kristin Waters, Recorder

I. Welcome and Introductions

- a. The conference call began at 2:04pm. Steve welcomed everyone to the call.
- b. Steve: As you know, part of our charge is to address issues of data storage and reporting of information that we collect from our students. During our conference call in July, we reviewed the recommendations for supporting transgendered students and agreed on some changes. Now, we need to take a look at the issue of data storage and reporting, so I'd like to start by asking those that do collect additional information (such as preferred pronoun and sex/legal sex) for any feedback on data storage and reporting.

II. Data Collection and Concerns

- a. Keith: We use Banner and modified the system so that the table listed preferred name instead of collecting data of gender and sex. We had a debate on our campus about making changes to legal gender. We have had only one student request for the records here to be changed because we are in a state where state agencies will make changes to documents, whereas other states, like Jack from Ohio, have a more challenging time. Recently, I met with a past student who is now in transgendered law. He has unique thoughts on legal sex and legal documents. I'll share my comments of our meeting at the end of our call. We made a modification to Banner to have the preferred name and preferred pronoun. The pronoun appears on class lists and advising documents only. We have tried to create a high level of control for students to manage their own identity. In our system, we have name and pronoun on the form.
- b. Judith: How did you modify Banner?
- c. Keith: We modified the tables in Banner; we did post the code for banner users. This document outlines what we did and did not change. I'll share this with you.

- d. River: I shared the previous discussion we had with my transgendered college student who really liked the preferred pronoun options.
- e. Judith: Are we recommending preferred first, middle, or last name? Connecticut College has a mandate for fall 2012. They are Banner school and they went to stake holders across the campus to learn which offices would be impacted by asking preferred name or legal name. What have you done with your stake holders? Do you collect legal sex?
- f. Keith: We collect sex, not 'legal' sex.
- g. Judith: Legal versus preferred name; sex versus gender identity.
- h. Keith: We did ask offices across our campus which information they would need; in some cases offices said they needed legal name but this was not always the case. Other offices had training on project, goals, and sensitivity of data with names. Some offices can't see both names because of lack of need to. Based on level of security and role at institution, you don't need access to different names.
- i. Steve: So it sounds like this is not just an issue of storage and reporting but also an issue of collection and usage. We could recommend schools to collect additional data fields that their SIS won't support, so should we recommendation that: a) individual institutions modify their SIS to collect additional data or b) AACRAO speak to the major SIS and ask for all to make a system modification that would include additional data fields?
- j. Jack: I think it would be best for AACRAO to make the statement to the major vendors that a modification needs to be made. This way, if there is agreement to modify the SIS, this would give individual institutions the opportunity to plan for the 'end date' of when the change would be made to the system. It would give institutions time to manage the 'politics' on their campus regarding this change in their system.
- k. Judith: I also agree that AACRAO should make the recommendation. They can serve as advocates and lobbyists for the vendors to address and make the changes as a baseline of their product.
- l. Keith: I want to verify that the field is labeled as 'sex'. At Fordham, for example, their data field is labeled as 'gender' and they collect information on Male and Female. So the term usage they have is inappropriately used for 'sex'.
- m. Judith: I think we have 'Gender' for our data field and collect Male/Female. This may be a flaw of Banner. I will verify how we label 'sex' and 'gender'. But this is part of why we are here – to address these types of issues.
- n. Steve: In our report to AACRAO, should we recommend that all of these options are available in the system so that individual school can make a choice on what to use?
- o. Jack: I am leaning more towards pronoun because 1) it's more palpable and 2) the infrastructure would be easier to manage
- p. Steve: During our last discussion, we decided to recommend different "best practices" and advise that the "local solution is the best solution" and that institutions would have the option to pick the best option for them.
- q. River and Keith: Both agreed that this is what they recall from the last discussion

- r. Judith: I've had conversation with several schools in my local area, and each of them have done their own.
- s. Keith: Referring back to my meeting with Kennedy, we are above the National curve in terms of preferred pronoun, and what's good about using preferred pronoun is that it keeps you out of defining what you mean regarding gender. For example, what does 'Female' mean at this institution. So I think we should recommend preferred pronoun.
- t. River: There are legal requirements per states that might make it a certain way to collect documents.
- u. Keith: Do states have a definition for legal sex, and for gender?
- v. Jack: I don't think states do
- w. Keith: So we need to look at State versus institution. The preferred pronoun works because it keeps the institutions from having to define gender.
- x. Judith/River: Agreed
- y. Steve: Personally, before we began these conversations, I felt that using 'Gender Identity' was the way to go, but now after hearing the conversations, I see why using Preferred Pronoun would be the best option. During the last call, we agreed that institutions would have different options to choose that worked best for their campus, with asking Legal Sex and then either Gender Identity or Preferred Pronoun. But I now sense that we would rather use Preferred Pronoun and remove Gender Identity?
- z. River: Do we have enough people here to make a decision?
- aa. Steve: Since we need to make recommendations to AACROA, I think we should make a decision to move forward
- bb. Jack: I don't think we should say anything about Gender Identity and we should state what we recommend regarding Legal Documents and Legal Sex.
- cc. Steve: AACROA is asking us to speak to the Consortium recommendations, specifically referring to Sex and Gender Identity. So it sounds like we agree that we should continue to ask about Sex but also recommend adding a field on our applications of Preferred Pronoun and Preferred Name?
- dd. Keith: Yes, schools need to decide what works on their campus. We need to make this a best practice. In fact, I recently read an article about the top ten most open/welcoming campuses; we should use what they do to be open to help us define our best practices.
- ee. Jack: Providing direction of where schools should go but leave it open for them, again, meets the local solution.
- ff. Steve: Okay, I think we are all on the same page now.
- gg. Keith: Regarding Sex and Gender, in Banner, it's easier to change the field on the form regarding gender than it is for Sex. This may explain why you see Gender on the field because that's easier to change.
- hh. Judith: This makes sense
- ii. Jack: This is a good opportunity to define language in our SIS
- jj. Vern: Have we spoken to Admissions Vendors? This may be a good opportunity to see how the Common App/Banner App can be modified to college data.

- kk. Steve: That is a great point, Vern. There are other areas on our campus that collect data that we should touch base with. For example, I know that many Residential Life Offices have their own system. So overall, we need to think about Applications through Admissions, the Student Information Systems, and Residence Life Systems. So overall, AACROA should take a position to recommend that SIS, and other areas such as Admissions and Residence Life, to modify systems.
 - ll. Judith: We should also keep in mind Credential Agencies, for example, the American Bar Association. We report Sex (not individual sex, but overall numbers); the report we send is based on ethnicity, but is divided into sex.
 - mm. Keith: The College of Medicine also sends a picture of the students in their reports.
 - nn. Judith: We don't send pictures.
- III. Data Reporting:
- a. Steve: These thoughts bring us to our next topic to review – data reporting. I have noted here that we need to think about ABA (American Bar Association), and the National Clearinghouse.
 - b. Jack: We need to think about what are the expectations regarding FERPA. What is their definition for release of information on Sex, Gender, Preferred Pronoun; Legal versus Preferred name. How do we handle these? What is directory information? Also, when you collect both, Sex and Preferred Pronoun, for example, what is listed?
 - c. Keith: We list a lot of information as directory, but it is not given out, it only goes to the Clearinghouse. We don't really get inquiries on directory information, but when we do, we can easily rebut it because of laws protecting the information. FERPA does have a list of what can't be released as Directory. This can be problematic. We do give students the opportunity have directory exclusion; we did touch base with AACRAO and the Legal Counsel to make sure we were okay in doing so.
 - d. Jack: OSU is working now to get Preferred Pronoun in the system; we are experiencing roadblocks from HR because of the shared database regarding students and employees. HR's response is that they trump the decision process of the name.
 - e. Judith: I am experiencing this as well; for us, the email will have the professional name, but payroll uses the preferred name.
 - f. River: I am experiencing this as well.
 - g. Jack: We also need to think about Data Warehouse – how do you archive this new information? If the name is changed in the system, how do you get the same change in the Data Warehouse? You could have an issue where live data is up to date, but archived data is not; so then how do you report information?
 - h. Steve: So overall I am hearing three questions: 1) What is considered directory information, 2) how do you manage changes within a shared database, and 3) how do you archive old and new data where there are changes? I will highlight in our report these issues that we'll need to continue to explore and address

- i. Keith: I just pulled my 2010 copy of FERPA Regulations – it states that grades, GPA, race, religion, national origin, and gender are **not** directory information. We should cite this. This is on page 24 of the 2010 guide.
 - j. Steve: In addition, AACROA will need to go into our documents and make changes as well. Also, Tina McEntire, suggested that we look at modifying how we collect Parent Information; we need to be aware that we can have students whose family members are transgendered. She recommended that instead of Mother/Father fields, we have Parent 1/Parent 2 fields or Guardian 1/Guardian 2 fields, or Father 1/Father 2 and Mother 1/Mother 2 fields.
 - k. Lou: I think we should recommend either parent or guardian because we could have students who do not have a mother or father.
 - l. Steve: So overall, we have discussed data reporting, storage, and best practices. Since our task force is coming to an end, we can recommend that this task force is extended or reappointment to 1) review best practices and 2) create policies.
 - m. Lou: I think it may be beneficial to connect with the Consortium members; they are very collaborative, and may be willing to create a workshop, participate in a conference call. Perhaps members from this group should join in so we can get input from them?
 - n. Steve: I will type up our notes and recommendations and send them forward. It will be interesting to see what the future holds for this group, perhaps we can have a session at our next conference.
 - o. Judith: Also, after today's conversation, I think the report from last meeting where we discuss Legal Sex should be changed to Sex.
- IV. Meeting with Transgendered Law student: Keith
- a. Keith: He reviewed our notes and recommendations and stated that he would be concerned with recommending anything that would tie institutions to the state because it's very likely that a state's definition may be based on one state agency, and the Federal Government could have a different definition as well. He also discourages the use of Legal Sex without having a concrete definition to support it.
 - b. He also asked how collecting information on Gender would make our campus feel more open. He argued that instead of collecting data to feel like you are an open campus to just have a statement on your application that you are an open campus.
 - c. Steve: My thought was that by asking the question, we would be showing that we are a welcoming campus; however, I've asked several students and agree with what he's saying, that it wouldn't really give them that impression either.
 - d. Keith: He also stated that from the student viewpoint, he would be hesitant to answer it because: 1) who can see this information you are collecting and 2) what are you doing with it?
 - e. River: Exactly, it makes students wonder if we are using it to admit them, even though we are not.

- f. Keith: He stated that there is a New Standard of Care, which provides a definition of sex and gender. It is very clear regarding Health Care. This is a positive way of defining Sex and Gender and how Health Care should treat this.
 - g. Lou: www.wpath.org
 - h. Keith: We should also turn to professionals in Residence Life. They have been dealing with gender neutral housing for quite some time; they may be able to identify some good points and have good sources for us to use. But overall, we should have a statement that encourages institutions to see that this is to help with student success and that schools should agree to it.
- V. Wrap Up
- a. Steve thanked the participants and the call concluded at 3:00pm

Notes submitted by:

Kristin A. Waters, Recorder